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Nordic Innovation Centre

To Certify Your Services

A study of the certification market in
the Northern European service sector

SUMMARY REPORT





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Foreword

Services account for between 60 and 70% of the economic activity in the EU and EFTA States. The promotion of the services sector has become a top priority for Europe, and better trade in services is also one of the main priority areas for the Nordic Innovation Centre.

The certification of services has the potential to become an important mechanism for assuring the quality both of the services themselves, and thus also the trade in these services.

From our point of view, it is important to ensure that certification schemes are mutually recognised, to prevent situations where enterprises will have to certify the same service in several countries.

We have taken the initiative to this study in order to obtain a better overview and understanding of the market for certification schemes in the service sector.

This study finds that by facilitating certification, state authorities can play an important role in promoting international trade in services. It is our ambition to initiate coordinating measures to assist Nordic and European state authorities to employ their resources efficiently.

Ivar H. Kristensen, Managing Director, Nordic Innovation Centre



Preface

This report has been prepared by MENON Business Economics for the Nordic Innovation Centre, and contains a study of the certification market directed towards the Northern European service sector. To our knowledge this is the first study of its kind.

The study is a part of the project “*Nordic platforms for better trade in services*” initiated by the Nordic Innovation Centre. The project aims to contribute to a well-functioning market for trade in services within the Nordic countries and in Europe. This includes influencing and implementing EU policies and initiatives within the service sector.

The study should be regarded as closely related to the survey “*Certification and Marks in Europe*” (Consumer Research Associates, 2008), commissioned by EFTA.

It is our ambition that this study will form a sound basis for more specific projects that can facilitate international trade in services.

Oslo December 2008, Gjermund Grimsby and Leo A. Grünfeld.

The full report may be downloaded from:
www.nordicinnovation.net

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EN 9110
Aerospace industry
maintenance

Green Key
Environment tourism

Safe guard
Security

EN 12522
Furniture removal

LVS 343
Dangerous devices experts

EN 14467
Diving services

Life in Uncertified town

OHSAS 18001
Occupational
Health and Safety

EN 15017
Funeral services

EN 45013 /ISO 17024
Playground inspection

EfbV Entsorgungsfachbetriebe VO
Waste disposal

Motivation for the report

Today, the service sector accounts for more than 2/3 of economic activity in most European countries. However, there is relatively little trade in services across national boundaries. The certification of services has the potential to become an important mechanism for assuring the quality both of the services themselves, and thus also the trade in these services.

Studies of the certification schemes within the tangible goods sector conclude that the market for certification and marking in Europe is confused. It is often necessary to repeat certification of the same product in several countries, which involves trade barriers and extra costs for producers (especially SMEs). This also leads to confusion among consumers and less transparency in the markets.

The need for certification has been fully recognized by the EU and has been implemented in EU policy by means of the Services Directive, cf. Article 26 (1a).

In realising the huge potential for growth in services, the potential risk of negative effects as a result of certification schemes at national level etc. is also significant for the service sector. Consequently, precautionary measures designed to prevent a similar situation developing in the service sector should be implemented.

In order to obtain a better overview and understanding of the market for certification schemes in the service sector, this study identifies national certification schemes and examines whether new schemes are developing and the nature of these schemes. The scope of the study includes the Nordic countries and their neighbours including the Baltic States, Poland, Germany, the Netherlands and the UK.

tion schemes directed towards the service sector is still relatively limited. However, the proportion of certificates issued to service sector businesses is growing, and the certification of services is expected to play an increasingly prominent role in the service sector in the future. There is already a tendency towards confusion within the market in relation to environmental certification due to the existence of the great diversity of environmental labelling governed by different requirements and interpretations.

To avoid the inefficient use of certificates in the service sector, it is important that coordinating measures are implemented. The authorities will have a potentially important role to play in this respect.

The number and level of proliferation of certifica-

The Universe of Certification, Standards and Accreditation

The world of certification activities (or conformity assessments) is complex and unfamiliar to the general public, as it is to most academics, business representatives, politicians and public administrators. In general terms, the universe consists of three parts that are tightly linked together: standards, certification and accreditation.

Definitions

Standard: Documented voluntary agreements containing technical specifications or other precise criteria to be used consistently as rules, guidelines, or definitions of characteristics, to ensure that materials, processes and services are fit for their purpose (ISO/IEC Guide 2:2004). Standards usually form the basis for certification schemes.

Certification: Third party attestation related to services/products, processes, systems or persons (EN ISO/IEC 17000:2004).

Accreditation: Third party attestation that the certification body is competent to issue certificates according to a specific standard. Accreditation is performed by national accreditation bodies, for which there exists one in each country.

Abbreviations

NICe: Nordic Innovation Centre

EA: European co-operation for Accreditation

EA MLA: EA multilateral agreement. The EA MLA is an agreement between European accreditation bodies.

IAF: Internationalization Accreditation Forum

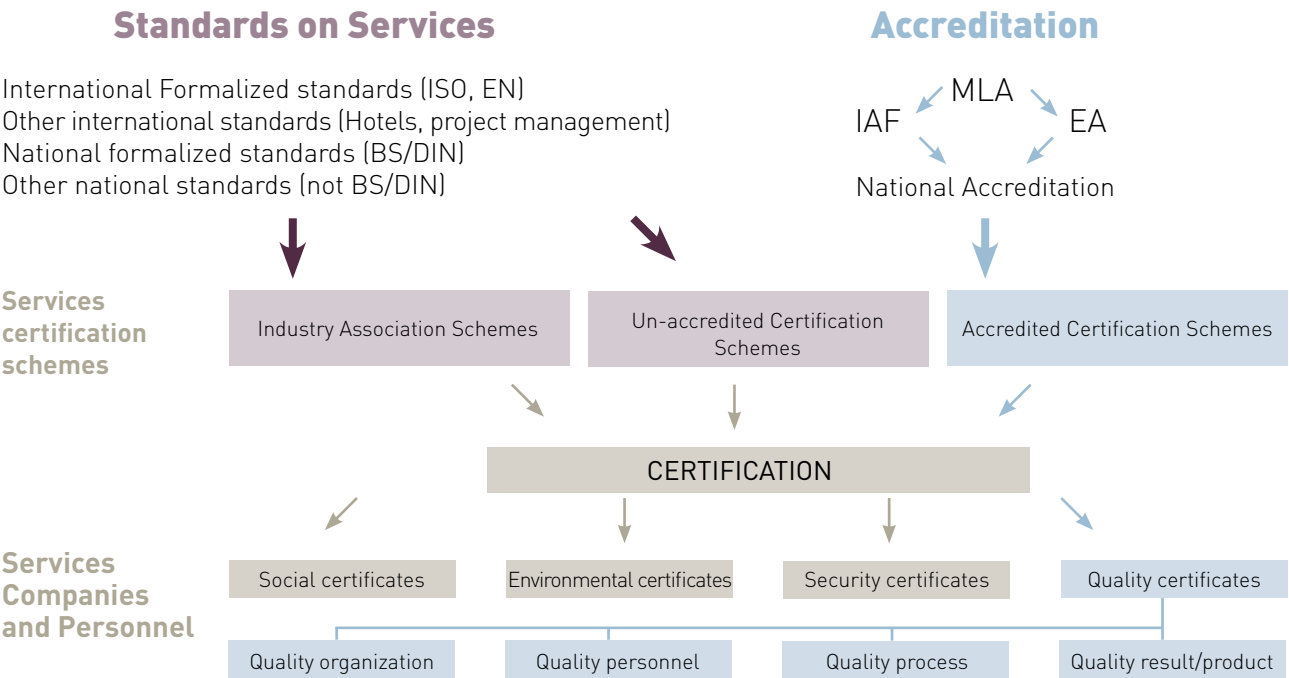
ISO: International Organization for Standardization

CEN: European Committee for Standardization

It is impossible to study certification activities without discussing standards. These are strongly linked due to the fact that certifications are usually based on specific standards.

The figure below contains a diagram showing the “certification universe”. In the top right hand corner these standards are referred to as formalised. However, note that the certification bodies (the agencies that issue certificates), also provide certificates based on a wide variety of less

formalised norms, criteria, and more or less formal conformity assessments which are not part of the formalised standardisation world. In this study these are referred to as “other standards”. They are rules and guidelines issued by bodies such as trade organisations or private certification bodies. Standards are also subdivided into those implemented at international and national level. International level standards are defined as those that are applied in two or more countries, whereas national level standards are applied purely domestically.





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The middle part of the diagram shows the certification bodies and their "*certification schemes*". A single certification body may run a series of certification schemes, each issuing separate types of certificate. The certification schemes are divided into three groups: 1) Accredited certification schemes, 2) Un-accredited certification schemes and 3) Certification issued by industry associations.

Accreditation is an activity with huge potential to coordinate certification activity across national borders. A certificate that has received accreditation in one country is recognised as equivalent to certificates in any of the signatory countries to the EA MLA (top left hand corner of the figure). This means that accreditation functions as a "passport" which facilitates access to the EU market without any additional certification requirements. The EA MLA also facilitates access to international markets by means of cooperation with the IAF. However, it should be noted that the EA MLA currently only applies to a very limited number of schemes employed in the service sector.

At the bottom of the diagram you will observe the different types and scopes of the various certificates. Most certificates provide some form of quality assurance; the quality of the organisation (QMS-certificates), the personnel within the organisation, the processes implemented within the organisation, or the actual output from the organisation. In addition, it has become increasingly common to issue certificates relating to social responsibility, environmental standards (EMS-certificates) and security/risk management.

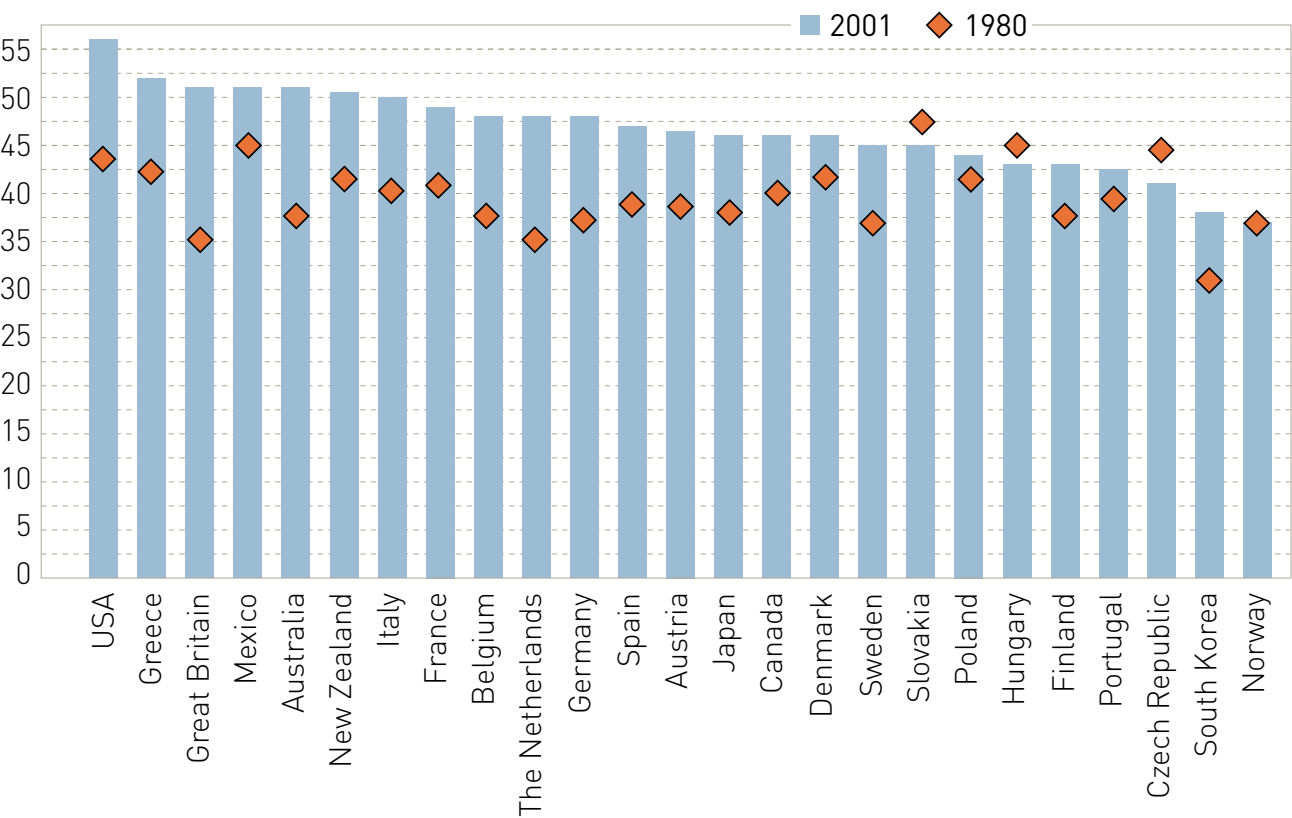
Why is certification

relevant to the service sector?

Strong growth in incomes within Europe during the past decades has led to an increasing share in the overall demand for services. Moreover, firms have

gradually chosen to focus their resources on core activities, and have thus outsourced important services. This trend has led to growth in the market for externally-generated services. Today, the service sector accounts for more than 2/3 of economic activity in most European countries, and market-based services represent at least 40% of the economy (see the figure displaying the OECD trends).

Value added in market based services as % share of GDP



Source: OECD



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Technological progress has facilitated higher levels of trade in services over longer distances and between new countries, offering new services to new markets. Greater international cooperation combined with the liberalisation of international trade serve to open new markets and create new competitive challenges for service providers. Today, trade in services represents approximately 20% of all cross-border trade.

However, there remain major natural impediments to trade in services. For instance, since many services are highly heterogeneous and it is difficult for consumers to evaluate their quality. In addition, many services require simultaneity in production and consumption, which consequently involves travelling for either the service provider or the consumer. It follows that the quality of the service cannot be evaluated before it is consumed. Certification schemes can help to overcome problems related to information. However, if certificates are to be used to promote cross-border trade in services, it is also essential that the certificates are recognised across national borders.

Since both the importance of the service sector and certification are apparent, it is important to examine the ways in which they interact. This study provides answers to questions such as:

- **What kind of services certification schemes currently exist?**
- **What types of services exhibit the greatest demand for certification?**
- **What is required for a certification scheme to be recognised across national borders?**
- **What effects does the certification of service providers have on international trade?**

The following outlines how these questions are answered.

The Methodology

In order both to provide structure and to extend its scope beyond a purely descriptive approach, this study seeks to provide answers to some key research questions that set the role of certification activities in an **international** context. The interview survey was designed in order to shed light on the following questions:

- **What factors contribute to a certification scheme becoming internationally recognised?**
- **What is the potential for future growth in certification activity directed within the service sector, with an emphasis on international aspects?**
- **Do higher levels of certification activity within the service sector contribute to more international trade in services?**

The study has employed both qualitative and quantitative approaches to these research questions. Firstly, the study employs telephone interviews and structured e-mail correspondence with a total of 50 certification, standardisation and accreditation bodies across Northern Europe. The largest component is provided by telephone interviews, involving a sample of 30 certification bodies, which were selected according to the following criteria:

- 1) a minimum of one certification body from each country,
- 2) one of the largest certification bodies from each country,
- 3) certification bodies that could demonstrate the broad spectrum of existing certification schemes applied to service providers and personnel.

Secondly, detailed data from the ISO 2006 Survey of Certifications was used to obtain a complete set of statistical data on the number of ISO certificates issued within the various service sectors. This study

applies the following relevant service sector typology:

Problem solvers who create value by solving specific and unique problems for their customers. The services are highly knowledge-intensive and display small economies of scale. There is a low degree of standardisation among these service providers. To a great extent these suppliers provide services that clients are not able to produce themselves. Examples include law firms, medical doctors, engineers, architects, and researchers.

Providers of **auxiliary services** generate customer value by performing time-consuming activities for firms and households that are easy to standardise. Such services are less knowledge-intensive and display moderate economies of scale. Typical examples include security and cleaning services.

Providers of **distributive services** generate value by facilitating interaction between customers, by means of activities such as the sale of goods, the transport of commodities and passengers and the distribution of information. Such services are relatively easy to standardise. Digital distributive services are highly skill-intensive, whereas manual distributive services are less so.

Providers of **leisure services** generate value by stimulating the emotions, perceptions and spiritual experience of their customers. Leisure services are highly heterogeneous and include activities such as sports, the arts, entertainment, restaurant and media services. These services are moderately skill-intensive.

Construction services. This group of services is treated separately. This is because construction is a highly heterogeneous service sector that has features in common with industry as well as exhibiting characteristics that overlap with many of the other service sectors.

The following chapter is dedicated to a presentation of the findings of the study.

Main findings emerging from the study

DESCRIPTIVE RESULTS FROM THE INTERVIEWS

Most of the certificates issued to the service sector are based on generic schemes. The term generic means that the scheme is not exclusive to any specific sector, but rather that it can be applied to most companies that provide services or tangible products (goods). Furthermore, half of the certification schemes identified were employed at national level, i.e., in only one country. There is a clear risk that such national level certification schemes act as non-tariff barriers to international trade. In addition, most of the certification schemes directed towards services do not constitute part of any agreement that ensures cross-border recognition of the certificates. If service certificates were included in such an agreement this would provide a major contribution to more liberal practices in terms of trade in services.

Generic certification schemes dominate in terms of certificates issued.

The survey identifies almost 37,000 service certificates issued as part of 83 certification schemes. Almost three quarters of the certificates issued, and one quarter of the certification schemes identified are “generic” (e.g. quality management schemes). The majority of the generic schemes focus on the management system of the company. However, in most cases different types of services demand different types of certificates. Personnel certification is popular among problem solvers and auxiliary services, whereas most of the purely process-orientated schemes were found within the construction sector. However, the boundaries between these are somewhat diffuse, and most certificates issued to service provider companies incorporate some element of process certification.

Distributive and problem solving service providers are the most frequent users of generic certificates. The remaining three quarters of the non-generic certification schemes were found mostly among the distributive and problem solving service providers. The table below illustrates how the schemes are subdivided according to service type:

Number of certification schemes by service type

Typology	No. schemes	% of total
Generic	19	23%
Problem solving	10	12%
Auxiliary	17	20%
Distributive	18	22%
Leisure	6	7%
Construction	13	16%
Total	83	100%

Half of the certification schemes identified operate at national levels.

The remainders were cross-border schemes, which means that they were employed in more than one country. National level certification schemes are put in place in order to provide a given level of quality assurance. However, a negative side-effect is that national schemes may act to obstruct cross-border trade. The rationale here is that parallel national level schemes generate additional costs for companies that wish to enter the markets.

Most service certification schemes are not part of a system for cross-border recognition.

Most of the certification schemes directed towards services are not part of the EA MLA. This implies that there is a clear risk that companies may be required to have additional certification in order to operate across national boundaries.

70% of the schemes identified were not formalised in the sense that they were not based on a standard issued by a national or international standardisation body (such as ISO or CEN). Such schemes are not covered by the EA MLA agreement between national accreditation bodies. Informal schemes do not therefore operate within a framework that provides assurance of certificate recognition across national boundaries.

The same is true for the service specific certification schemes (non-generic) based on formalised standards, for which the schemes themselves are yet to be accredited. Consequently, when the service providers intend to expand their activities across borders, there will be no formalised system in place to ensure that their certificates will be accepted in other countries. There are many reasons as to why these schemes are not part of the EA MLA. Firstly, very few service specific certification schemes are accredited. Without accreditation you cannot be included in EA MLA. The reason for this lack of accreditation may be that most of the schemes are new, or because costs are too high in relation to the number of clients, or because it is not possible to provide them with accreditation. Secondly, even if the schemes were accredited, they will not necessarily be included in the EA MLA.

SECTOR AND REGIONAL SPECIFIC FINDINGS

The international nature of leisure services (e.g. tourism) implies that consumers could reap benefits from the existence of internationally harmonised certification schemes. There is a trend of increasing demand for certification of leisure services from its current low level, but it is not clear whether these schemes will operate at national, regional or international levels. Within the sphere of environmental certificates there are a vast number of schemes. While some of the schemes are said to be complementary, others operate in direct competition. This is an unfortunate situation since the existence of many label-

ling standards confuses consumers and generates extra costs for companies.

The northern European countries with the most accredited certification of services in relative terms are Lithuania and Estonia. This is due in particular to a high number of certificates in the construction sector, which in turn can be explained by the certification requirements demanded for public sector tenders.

Few certificates within leisure services – but there are plans in the pipeline.

Leisure services constitute the service sector with the fewest certificates. This is partly due to the relatively small size of the sector within the total economy, and partly because of the nature of leisure services which makes them more difficult to standardise. However, the leisure service sector is among the most internationalised, and there is much scope in terms of potential benefits in adopting a certification system which is broadly recognised, and which has the ability improve information flow to the consumer.

From information provided in the interviews, it is clear that there are plans for growth in certification schemes within this sector. However, it is less certain whether these will be national, regional or international in their scope. For example, there are currently many European versions of the hotel “star” classification scheme. In a few cases, such as in Denmark, Sweden and the Baltic countries, a common standard has been implemented.

Competing schemes within environmental certification.

By far largest number of schemes is found within environmental certification. While some of the schemes are said to be complementary, others are in direct competition. The existence of many schemes creates an unfortunate situation which may lead to confusion among consumers and extra costs for the companies.

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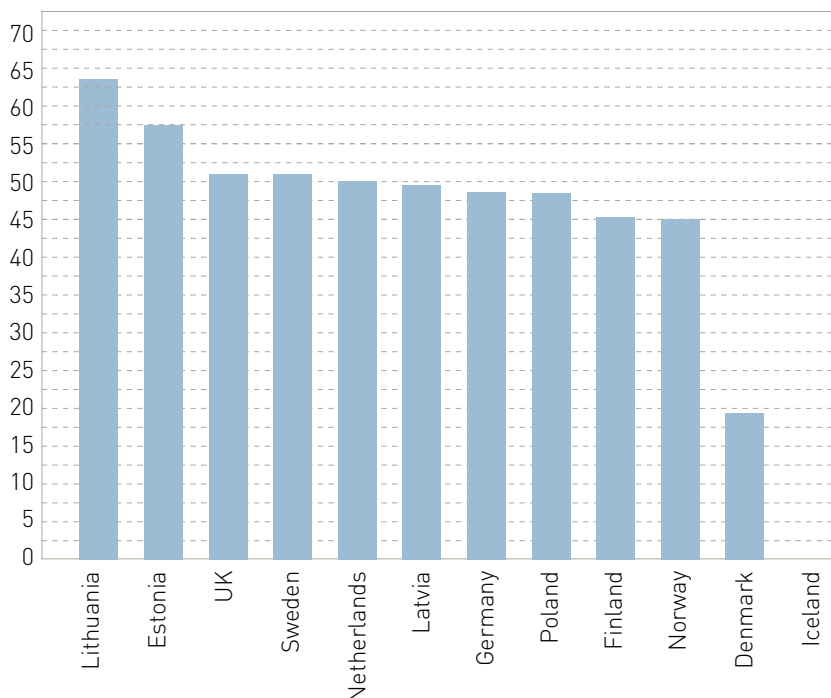
On its website, the magazine “Verträglich Reisen” reports that more than 50 environmental certification schemes and labelling standards are found within Europe. Among the 30 organisations covered in the survey, 8 schemes related to environment were identified. This is an important finding, since it indicates that if no measures are implemented to coordinate these activities, we may become witness to a chaotic situation similar to that which we currently observe within the tangible goods sector.

The Baltic countries have a major share of certification activities within the service sector.

Lithuania and Estonia represent those northern European countries with the highest levels of

accredited certification of services relative to the size of their national economies (ref. the table below). Both countries have more certified service provider than manufacturing companies. This may be due to the fact that the requirements demanded in terms of certification in relation to public sector tenders in the Baltic countries, especially within the construction sector, makes some certification schemes *de facto* compulsory for the service provider companies. Certification could also act as an important assessment factor in situations involving competition for public sector tenders related to waste management contracts in Germany.

**Certification of service provider companies relative to total
(ISO 9001 and ISO 14001 certificates)**



COSTS OF CERTIFICATION

This survey shows that costs incurred to obtain the same certificate differ significantly between European countries, indicating that the European market is somewhat fragmented. Another finding is that many smaller service companies will never become certified because the auditing costs incurred relative to the costs of certification exceed the commercial benefits of obtaining certification. The survey also points to the fact that there is an additional cost factor related to entry into the system of mutual cross-border recognition (EA MLA).

Differing prices between countries.

The cost of certification varies significantly between countries. For a small service company with about 10 employees, an initial certification will normally take from 2-4 days and cost somewhere in the region between 1500 and 3500 Euro. Annual audits are also required in order to maintain the certificate, and these cost about 1/3 of the initial costs. Every third year there is a more extensive auditing process which costs about 2/3 of the initial outlay. The auditing rates appear to increase with general cost levels within the countries in question. Hence, the lowest rates are found in the Baltic countries and in Poland, while levels in the rest of northern Europe are more or less the same. Once a well-functioning system for mutual recognition of certificates between countries has been established, one should expect companies to seek out certification services in countries which offer the optimal combination of quality and price. In other words, certification provides an example of a service with a huge potential for internationalisation.

Net benefit of certification – negative for small companies?

The fees do not seem to increase in direct correlation with the size of the firm in question. This means that there are economies of scale involved in certification, which consequently makes the certification burden somewhat greater for small and medium sized businesses, than for major companies. For

small firms, there are indications that the costs of certification may exceed the value added by obtaining certification. In cases where different countries have different certification schemes, for which there are several examples of within the tangible goods sector, the costs of certification are simply scaled up, making it prohibitively expensive for smaller companies to obtain certification.

Additional costs related to a system for international acceptance of certificates.

Subscriptions to accredited certification schemes are generally more expensive than the requirements for “membership” required by trade associations or certification schemes run by non-governmental organizations. This cost difference is related to the additional third party verification process carried out between the certification body and the accreditation institute. However, it is important to note here that accreditation is a prerequisite if a certificate is to be recognized as part of the EA MLA and for obtaining a mutually recognized cross-border certificate.

BROAD TRENDS RELATED TO CERTIFICATION OF THE SERVICE SECTOR

The majority of certification bodies interviewed in the survey expect that service providers will demand higher levels of certification in the coming years, especially from the group of generic certificates. A statistical analysis shows that a higher density of certified service companies within a given country results in higher exports, and reduced levels of imports. Hence, the net effect of the service sector on trade is uncertain. Furthermore, the analysis shows that facilitation of certification by the state has a positive effect on trade in services. In order to obtain international recognition for their schemes, the certification bodies identified international standards, accreditation and their presence in national markets as the three most important single factors.

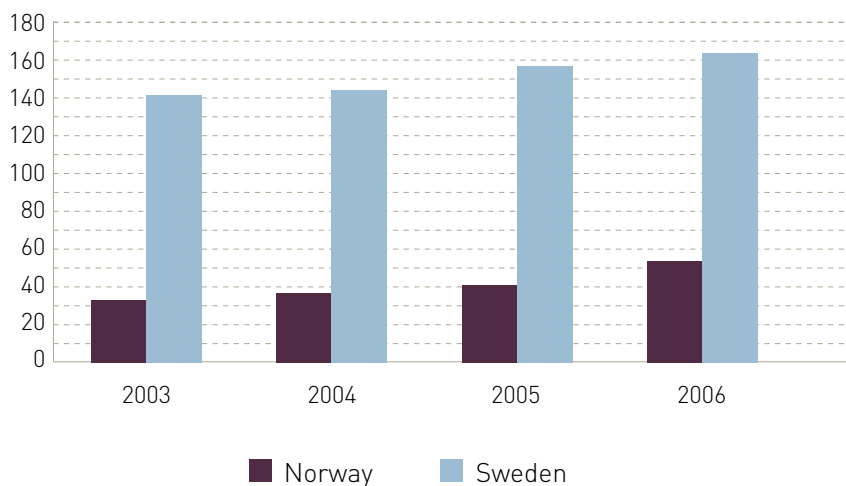
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Increasing demand for certification of services.

The majority of the certification bodies reported growth in the proportion of certificates issued to the service sector, and that they expect the certification of service providers to play an increasingly prominent role in their future business activities. Many of the certification bodies interviewed emphasise the view that an increase in the number of certification schemes within the service sector may create confusion concerning the significance of the certificate.

Consequently, the greatest potential is perceived to be in the field of generic certification schemes which may be employed across all service sectors. The perception that the certification market is currently growing also finds support in the data. The figure below shows how turnover among accredited certification bodies in Norway and Sweden has grown steadily during the past three years, indicating increasing demand within the market for certification.

**Turnover within the certification market,
Sweden and Norway, 2003-2006 (mill. Euro)**



Success factors for international recognition of certification schemes.

The most important factors that determines whether a certification scheme becomes internationally recognised are; a) that it is based on an international standard (usually ISO or CEN), b) that the scheme is accredited, and c) that the certification body has subsidiaries abroad. If a certification body is part of an international network, the probability of international recognition increases. Additional prerequisites for the international harmonisation of certification schemes are that the services should; 1) operate within growing markets, 2) possess a large potential for international trade, and 3) be problematic in terms of the consumer's ability to assess their quality. The logic behind these criteria is firstly that a certification must resolve a deficiency in the market, secondly that there exists scope for the introduction of international schemes, and thirdly that the market is large enough to generate profits on the introduction of certification.

Certification of the service sector results in increased exports and reduced imports.

Econometric analysis shows that there is a higher density of certified companies operating within economies which display higher levels of exports within the service sector. This indicates that trade increases with certification. However, the analysis predicts that increased levels of certification of the service sector also goes hand in hand with reduced levels of imports, which results in an opposing effect. We interpret this pattern as evidence of a pro-competitive effect of certification, resulting in improvements in export potential as well as in competitiveness within domestic markets. Hence, the preliminary finding is that as the general level of certification increases within all countries, the net effect on trade will be small as diminishing levels of import of services will tend to neutralise the increased propensity to export services. However the effects on welfare may be considerable as increased certification activity promotes increased competition, both among domestic and foreign suppliers. However, this result

is not entirely clear cut. An alternative explanation for the negative effect on imports could be that markets containing a high certificate density also have a *de facto* requirement that companies obtain certification. This in turn could work as an obstruction to trade since entry into the market will incur an additional certification cost for the foreign supplier.

State facilitation has a positive effect on trade.

The results of the econometric study show a positive effect on trade in services based on the index reflecting state facilitation of certification. This indicates that the promotion of certification by the state can have a positive effect on cross-border trade. For example, this may involve regarding international certification procedures as an alternative to domestic regulation, combined with having single contact points that provide information about existing certification schemes to foreign suppliers.

Conclusions and Recommendations

This study finds that by facilitating certification, state authorities can play an important role in promoting international trade in services. Facilitation of certification may involve promoting a policy which promotes the development of harmonised cross-border schemes and standards, as well as identifying those schemes that are included in the EA MLA. Such a policy would have several benefits.

In order for the state authorities to employ their resources efficiently they should first and foremost concentrate their facilitation efforts on 1) services for which it is difficult for customers to make an assessment of quality, 2) services which have a large potential for international trade, and 3) service groups for which the markets are sufficiently large to be able to operate a profitable certification scheme. In this respect it might be a good idea to focus on certification schemes that are already in place.

Convergence of prices for certification.

The study identifies large variations in costs for similar certificates between different countries. Such cost anomalies can exist only while similar certificates issued in different countries continue not to be recognised across borders. Hence, together with a more active policy promoting mutual recognition, one should expect a harmonisation of prices. This will be beneficial in particular for many of the small and medium-sized companies that dominate the sector, but which often find it too expensive to invest in certificates.

A role for state facilitation.

The results from the statistical study indicate that in order to promote international trade in services,

governments should invest their efforts in consolidating their policies towards harmonisation and certificate recognition. Here, the most important role for the authorities is to take steps to ensure that schemes are not implemented unilaterally, but on a coordinated European/international scale. The same applies to standards. Here the state must tread the fine line between on the one hand acting as an early-stage promoter in order to avoid instances where there already exist parallel cross-border certification schemes, while on the other hand waiting for the market to give indications as to what types of schemes are actually needed.

Clarify those schemes that are part of the EA multilateral agreement.

The study also concludes that the state could play an important role in encouraging clarification as to which certification schemes form part of the EA MLA established between the national accreditation bodies. The agreement provides a potentially very important coordination mechanism that ensures mutual, cross-border certificate recognition. However, in order to ensure that the agreement achieves its full potential, the authorities can play a role by facilitating a process which guarantees that accredited certification schemes directed towards the service sector also become part of the agreement.

Criteria for certification of services.

The results from the study show that it is important that authorities focus their “certification facilitation” efforts on services where there is both a need and potential for internationally harmonised standards and certification schemes. Important prerequisites would be; 1) addressing the problem of assessing the quality of the service prior to consumption and the short-term supplier-customer relationship, 2) that the service has considerable scope for cross-border trade, and 3) that the market is sufficiently large to make an individual certification scheme cost-effective.

Focus on existing schemes rather than additional schemes.

The sentiment among the certification bodies seems to be that there should be greater focus on certificates issued within existing schemes for services, rather than on developing new certification schemes. An important argument here is that as the number of certification schemes increase, the harder it will be for the customer to distinguish meaning among the different schemes. This argument is particularly relevant argument in relation to sectors where the customer is a non-professional, and does not have the time or the required expertise to fully understand or compare multiple certificates. The increased use of generic certification schemes within the service sector is also in line with this recommendation.



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Nordic Innovation Centre initiates and finances activities that enhance innovation. We cooperate primarily with small and medium sized companies in the Nordic region. We aim at developing a smoothly functioning Nordic region without national barriers. Nordic Innovation Centre is an institution under the Nordic Council of ministers. The centre is located in Oslo, but has projects in all the Nordic countries.

Read more about us at: www.nordicinnovation.net